Linking Task Groups to Assembly Line Item Codes

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When you link an <u>active task group</u> to an assembly <u>line item code</u>, and that item is subsequently included on an order, the system will generate and schedule the tasks needed to complete the order.

You can link task groups using two methods:

Link a Task Group to a Single Assembly Line Item

- 1. Navigate to Menu > Order Setup > Line Item Codes.
- 2. Use the <u>Quick Search</u> bar to locate the desired assembly line item code.
- 3. In the detail view, click **Edit**.
- 4. At the bottom of the Bill of Materials tab, click the **Task Group** field and select the desired task group.

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5. Click Save.

The record updates with the estimated length of time and fulfillment cost from the task group.

Link a Task Group to a Group of Records

When several assembly line item codes have the same standardized fulfillment process, you can link a task group to all of them at once:

- 1. Navigate to Menu > Order Setup > Line Item Codes.
- 2. Use the <u>Quick Search</u> bar to display the set of records that need to be linked to the task group.
- 3. Click the Admin Actions icon (
- 4. Select Update Task Group for Line Item Codes in List

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- 5. At the confirmation dialog, click **Select**.
- 6. At the Task Groups Selector, click on the desired task group.

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7. At the confirmation dialog, click **OK**.

Note: Any line item codes that are not Assembly or Assembled Inventory Type will be skipped and *not* have the task group linked.